

1-12 (cancelled).

13. (withdrawn) A financial management system comprising
a terminal device;
a financial management program; and
a commercial web server capable of conducting online financial transactions, wherein the
financial management program receives transaction data regarding the online financial
transaction upon completion of a financial transaction.

14. (withdrawn) The financial management system of claim 13, wherein the terminal device is a
wireless terminal device.

15. (withdrawn) The financial management system of claim 14, wherein the terminal device is
assigned to a user, and the financial management program is assigned to the user, and the
financial management program does not reside on the terminal device.

16. (withdrawn) A financial management system comprising:
a terminal device;
a financial management program; and
a scripting agent, wherein the scripting agent receives transaction data from the terminal device
and automatically forwards a copy of the transaction data to the financial management program.

17. (new) A financial management system comprising:

a commercial web server provided by a merchant, said commercial web server having a set of transaction processing executable source code configured to process an online transaction when a set of commercial web server transaction data is received, and

a terminal device comprising:

a personal financial management application configured to store personal financial management application transaction data including purchase amount data, purchase date data, payee data, and card identification data, and

a financial assistant comprising:

a set of graphical user interface generation executable code configured to generate a graphical user interface at the conclusion of the online transaction, the graphical user interface comprising:

a purchase amount field,

a purchase date field,

a payee field,

a card identification field,

a category field configured to accept user input, and

an accept button,

a set of graphical user interface population executable code that populates the purchase amount field, the purchase date field, the payee field, and the card identification field based on the commercial web server transaction data, and

a set of personal financial management application transmission
executable code that transmits the personal financial management application
transaction data from the fields of the graphical user interface to the personal
financial management application when the accept button is activated.

18. (new) The financial management system of claim 17, wherein the personal financial management application is Microsoft Money.

19. (new) The financial management system of claim 17, wherein the personal financial management application is Quicken.

20. (new) The financial management system of claim 17, wherein the financial assistant operates within the context of a web browser.

21. (new) The financial management system of claim 17, wherein the financial assistant is part of a web browser.

22. (new) The financial management system of claim 17, wherein a web browser residing on the client terminal renders the graphical user interface.

23. (new) The financial management system of claim 17, wherein a web browser residing on the client terminal renders a graphical user interface which prompts the user to select one of a number of predetermined categories associated with the personal financial management application.

24. (new) The financial management system of claim 23, wherein the web browser creates an associated list of merchants and categories based on previous selections.

25. (new) The financial management system of claim 24, wherein the web browser provides a suggested name based on the name of the merchant.

26. (new) The financial management system of claim 25, wherein the web browser creates an associated list of merchants and categories based on previous selections, and provides a suggested category based upon the associated list if the merchant has previously been associated with a category.

Remarks/Arguments

Claims 1-12 are cancelled. Claims 13-16 are withdrawn. Claims 17-26 are presented.

1. The Claimed Invention:

Applicant's invention is directed to a terminal device, such as a computer, having a personal financial management application (e.g., Microsoft Money or Intuit's Quicken) and a financial assistant. The terminal device is configured to interact with a commercial web server, such as by having a web browser (e.g., Internet Explorer) that may interact with a commercial web server (e.g., Amazon.com) by visiting a particular URL (e.g., www.Amazon.com). When a purchase is made on the terminal device, the financial assistant generates a graphical user interface (e.g., a pop-up window or other interface) that allows a user to enter the transaction data into the personal financial management application.

In one embodiment, the invention may be understood by the following sequence: user visits purchase web page and, upon completion of the purchase, a new window is opened having the purchase information (e.g., amount of purchase) populated; the user selects a category from a drop down, clicks accept, and the information from the graphical user interface (e.g., purchase information as modified by the user) is provided to the personal financial management application.